



Managing Selection Areas

**IROC Dispatch Training Instructor Guide:
Advanced Course**

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Overview

This instructor guide is intended to be used with the PowerPoint document for Managing Selection Areas. As you click through the slides, use the text included here to provide additional information. The student guide follows the same format; encourage students to follow along and make notes.

Objectives

Upon completion of this unit, students will understand how to:

- Create and maintain a selection area within IROC.
- Establish ordering authorities for a selection area.
- Establish placing authorities for a selection area.
- Create and maintain a selection area master.

Presentation

Slide 1: Introduction



Welcome students to the class and explain:

- This section of the advanced user course introduces you to selection areas and selection area masters.
- Only dispatch managers with the selection area manager role can create and maintain selection areas or selection area masters in the IROC Data Management Tool (DMT).
- During this section of the course, you will see how the knowledge you gained from the "Navigating the DMT" video and "Managing Records in DMT" can be put into action.
- You may wish to follow along in your student guide as we work through this section.

Slide 2: Course Objectives

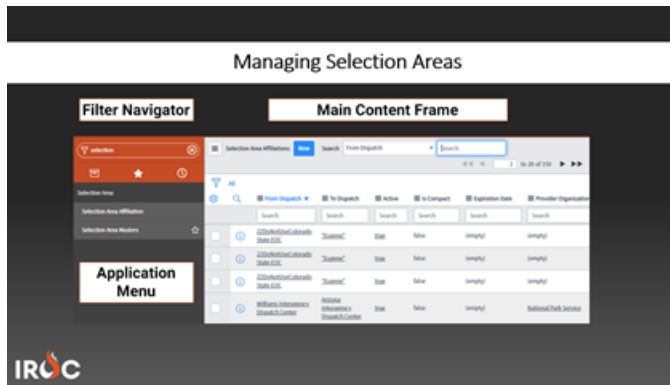


Review the objectives for this training as posted on Slide 2 and on the preceding page.

Provide a brief overview of selection areas:

- A selection area is used to generate an ordering channel directly between selected dispatch centers.
- A dispatch manager with the role of selection area manager can create and maintain selection areas and selection area masters.
- Selection area managers can only manage selection areas for their subordinate dispatch centers.
- A parent dispatch center (managing organization) establishes a selection area for one of its subordinates. The selection area established by the parent is unidirectional (one way); it allows the parent's subordinate dispatch center to directly place requests to one or more other organizations.
- The members of the selection area can cross geographic area boundaries.
- Configuring a selection area with ordering authorizations allows the selection area manager to designate the dispatch centers that are authorized to place requests for the identified catalogs, categories, or catalog items.
- Configuring a selection area with placing authorizations allows the selection area manager to limit the placing actions that the receiving dispatch center can perform on a request that was received via the selection area.
- Selection area managers can also create a selection area master, which allows them to create a selection area from many subordinate dispatch centers to many other dispatch centers in one step.

Slide 3: Managing Selection Areas



Show how to navigate to the selection area modules in the application navigator:

- 1 Search for the selection area modules by typing “selection” in the Filter Navigator on the left side of the screen.
- 2 IROC DMT has two selection area modules in the application menu.
 - Click on **Selection Area Affiliation** to view, manage, and create selection area affiliations.
 - Click on **Selection Area Masters** to view, manage, and create selection area masters.
- 3 To save time in the future, hover to the right of the module in the application navigator and click the **Star** icon to add it to your favorites list. It will now appear in the Favorites tab of the application navigator.
- 4 You can use any of the tools mentioned in “Managing Records in DMT” to filter, search, or organize the information in the list view.
- 5 To create a new selection area, click **New** at the top of the main content frame.
- 6 To view information related to a selection area, click on the **Information** icon in that row and then click **Open Record** in the upper-right corner of the preview screen.

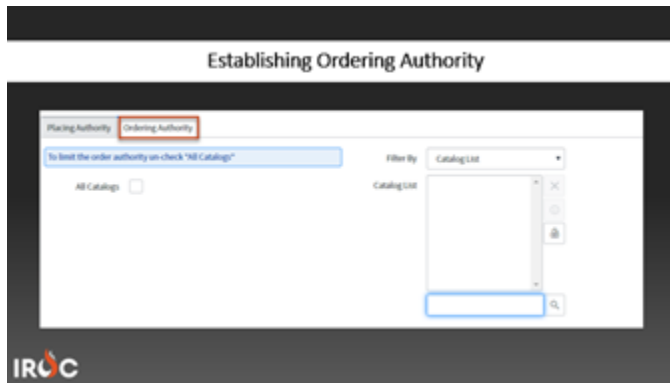
Slide 4: Creating a New Selection Area

Note: As you demo creating a selection area in IROC, illustrate how to right-click in the header bar and click **Save** to save your work as you go.

Show how to create a new selection area:

- 1 Choose the **Selection Area Affiliation** module from the application navigator and click **New** at the top of the main content frame.
- 2 In the Selection Area Affiliation: New Record screen, use the **Search** icon or perform a type-ahead search to search for the managing organization. This is the parent dispatch center that is creating the selection area for its subordinate dispatch centers.
- 3 To indicate that a selection area is part of a compact, check the **Compact** checkbox and select the appropriate item in the **Compact** field that appears.
- 4 Select the **From Dispatch**, which is the subordinate dispatch center for which you are creating the selection area.
- 5 Select the **To Dispatch**, which is the dispatch center that will be a member of the resulting selection area.
 - Clicking the **Information** icon that appears beside the from and to dispatches reveals information related to that organization.
- 6 The default for a selection area is for it to be active from the time of creation. Unchecking the **Active** checkbox sets this as inactive, which means you have created the selection area, but it is not yet active.
- 7 You may also select the **Provider Organization**. This limits the subordinate dispatch center to only being able to request items own by this provider.
 - To configure a selection area so that the subordinate dispatch can request items owned by any provider, simply leave the **Provider Organization** field blank.
 - For more information on provider organizations, refer to the “Additional Information” section of the student guide.
- 8 Select the **Expiration Date** and **Time Zone**, if applicable.
- 9 At this point, you can establish placing and ordering authorities, as described next, or click **Submit** to create the selection area.

Slide 5: Establishing Ordering Authority for a Selection Area



Explain:

- Selection area managers can configure limitations on the items that can be requested via a selection area. These limitations are referred to as *ordering authority*.
- IROC defaults ordering authority to “all catalogs.” Unchecking the **All Catalogs** checkbox in the Ordering Authority tab allows you to limit ordering authority to specific catalogs, categories, and catalog items.
- For more information on ordering authority, refer to the “Additional Information” section in the student guide.

Show how to set the ordering authority:

- 1 On the Ordering Authority tab on the bottom half of the screen, uncheck the **All Catalogs** checkbox.
- 2 Choose the appropriate filter from the **Filter By** drop-down.
 - Choosing **Catalog List** gives authority to order from an entire category, such as Crew or Equipment. You can choose more than one catalog.
 - Choosing **Catalog Category List** gives authority to order from catalog categories, such as Airtanker or Tender, Water).
 - Choosing **Catalog Item List** gives authority to order specific items from any catalog, such as Crew, Type 1 and Airtanker, Type 3.
- 3 Show how to use the **Lock** icon to add items to the list.
 - Click the **Lock** icon to open the list field.
 - Click the **Search** icon or perform a type-ahead search in the search field and then select the desired item. Repeat this step as often as needed.
 - The functionality of the **Lock** icon is covered in more detail in the “Managing Records in DMT” student guide.
- 4 To delete an item from the list, select it and click the **Delete** icon.
- 5 When done, click the **Lock** icon again to save your changes.

Slide 6: Establishing Placing Authority



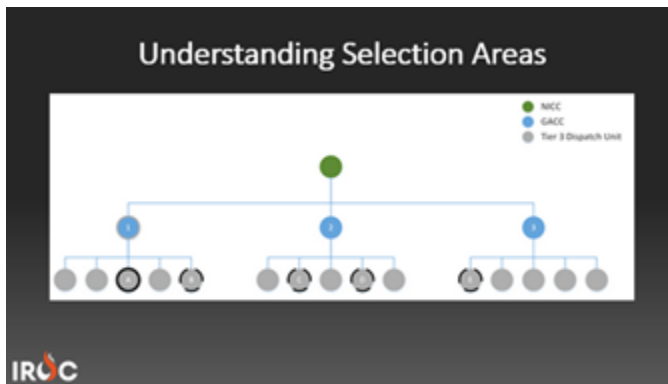
Selection area managers can also limit the actions that members of a selection area can take on requests that their subordinate dispatch center places to them. This limitation is referred to as *placing authority*.

Explain: To set placing authority, simply check or uncheck the boxes on the Placing Authority tab.

- **Place Down Authority** allows a recipient to place the request down to a subordinate.
- **Place Up Authority** allows a recipient to place the request up to the parent.
- **Place Direct Authority** allows a recipient to place the request directly to one of its selection areas.

For more information on ordering authority, refer to the “Additional Information” section in the student guide.

Slide 7: Understanding Selection Areas



After showing how to create a selection area, use this slide to give a recap of the process.

- The selection area manager at GACC 1, sets up a selection area for its subordinate Dispatch Center A.
- The selection area manager at GACC 1 includes Dispatch Centers B, C, D, and E in Dispatch Center A's selection area.
- Dispatch Center A can now place requests directly to Dispatch Centers B, C, D, and E.
- This is a one-way (unidirectional) relationship; Dispatch Centers B, C, D, and E cannot place requests directly to Dispatch Center A.
- Until the selection area manager at GACC 1 explicitly sets ordering authority, Dispatch Center A cannot place a request to Dispatch Centers B, C, D, or E.
- Until the selection area manager at GACC 1 explicitly sets placing authority, Dispatch Centers B, C, D, and E can only UTF (unable to fill) or fill a request that Dispatch Center A places directly to them.

Slide 8: Viewing and Editing an Existing Selection Area



Once a selection area is created, you can navigate to the Selection Area Affiliation module in the application navigator and view all records in the main content frame.

Explain:

- You can only edit selection areas for your subordinate centers.
- In this screenshot, we clicked on the **Information** icon for the Southwest Area Coordination Center to see the Selection Area Affiliation preview screen. To edit this record, we could click **Open Record** in the upper-right corner.

Explain how to access information related to a specific selection area:

- Click the **Information** icon for the selection area you want to edit.
- Click **Open Record** in the Selection Area Affiliation preview screen.
- Edit the appropriate fields, including on the **Placing Authority** and **Ordering Authority** tabs.
- When done, click **Update** to save your changes.

Slide 9: Creating a New Selection Area Master



Explain: A selection area master allows selection area managers to create selection areas from one or more subordinate dispatch centers to many other dispatch centers, in one step.

Show how to create a new selection area master:

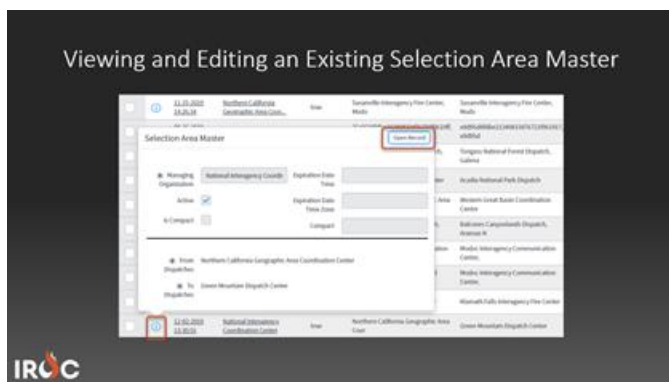
- 1 Click the **Search** icon in the **Managing Organization*** field to bring up a searchable list of organizations for which you are a dispatch manager. Click on a desired unit to select it.
- 2 As with selection areas, selection area masters can be set to active or inactive, as indicated by the **Active** checkbox.

- 3 To indicate that a selection area master is part of a compact, click the **Compact** checkbox and then select the appropriate item in the **Compact** field.
- 4 Set the **Expiration Date**, **Time**, and **Time Zone**, if applicable.
- 5 Select the **From** and **To Dispatches**.
 - Click the **Lock** icon to open the list.
 - Search for the appropriate dispatch center and click on it to add it to the list. Repeat this step as often as needed.
 - When done, click the **Lock** icon again to save your changes.
- 6 After setting the appropriate ordering and placing authorities, click **Submit** to save your changes.

Explain:

- Setting ordering and placing authority is the same as for creating a new selection area.
- All specified ordering and placing authorities will apply to each resulting selection area. For example, in the screenshot example, we created the following selection areas, for which all the same authorities apply: Albuquerque and Aransas, Albuquerque and Balcones, Albuquerque and Padre Islands, Alamogordo and Aransas, Alamogordo and Balcones, and Alamogordo and Padre Islands.

Slide 10: Viewing and Editing an Existing Selection Area Master



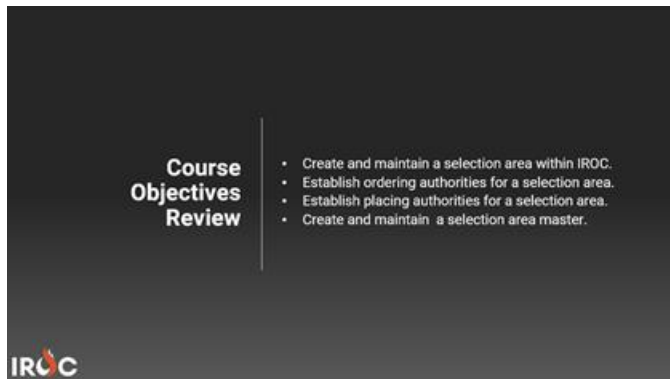
Explain:

- Viewing, editing, and deleting selection area masters follows the same steps used for selection areas.
- In this screenshot, we have clicked the **Information** icon for a selection area created by NICC. To modify this record, we would click **Open Record** in the upper-right corner.

If necessary, provide a review of how to maintain a selection area master.

- To view all selection area masters, navigate to the **Selection Area Master** module in the application navigator.
- In the main content frame, search for the selection area master you want to modify and click the **Information** icon.
- Click **Open Record** in the Selection Area Master preview screen and make your changes.
- When done, click **Update**.
- Or click **Delete** in the upper-right corner to delete the selection area master.

Slide 11: Objectives Review



Take a moment to review the objectives for this course and respond to any questions before concluding the training session.